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Presentation of the Results of the Public and Visitor Surveys to the Toronto Public Library Board

February, 2013

Objectives and Methodology

- ◆ The purpose of the surveys reported in this presentation was to assess overall attitudes and patterns of usage of Toronto Public Libraries. Other objectives were to:
 - Determine impressions of library services;
 - Gauge the types of activities conducted at libraries; and,
 - Ascertain attitudes towards the library.

- ◆ Two surveys were undertaken for the TPL:
 - A hybrid online/telephone survey of a random sample of Toronto residents; and
 - An in-library survey of TPL users.

Hybrid Panel

- ◆ A total of 1,220 interviews were conducted among Toronto residents between mid October and early November 2012. The methodology consisted of a randomly selected hybrid panel. Respondents to the panel were recruited randomly by telephone using an Interactive Voice Response system and invited to participate. Those who agreed were later contacted, screened and basic demographic information collected.

Objectives and Methodology

- ◆ Most panellists responding to the TPL survey did so online (83%) but those with no online access or through choice answered the survey by telephone (17%). The sample of 1,220 is accurate to $\pm 2.7\%$, 19 times out of 20.
- ◆ The 2012 findings are compared, where applicable, to findings from the 2006 and 2001 surveys.
- ◆ In some cases findings may not be strictly comparable because of the change of methodology for the 2012 survey. Previous surveys had used a telephone methodology while most 2012 respondents answered the survey online. Research comparing the two methodologies suggests that there can be differences in response on specific types of questions.
- ◆ The decision to move to an online methodology was made for two reasons:
 - Cost effectiveness; and
 - The trend of public opinion surveys away from telephone as a methodology toward online and the need to eventually make this move.

Objectives and Methodology

In-Library Survey

- ◆ A total of 2,281 randomly selected users of a Toronto Public library branch completed surveys as they were leaving the library. Surveys were available on dedicated laptops and in paper format.
- ◆ In all, 20 library branches participated in the survey:
 - The two reference libraries;
 - Four district libraries; and
 - 14 neighbourhood libraries.
- ◆ Surveying took place over a two week period from November 21 to December 11, 2012 and generally matched the flow of users through the day. That is more interviews were solicited during heavier usage periods.
- ◆ At each branch, visitors were selected randomly and the results can therefore be generalized to the 20 libraries included in the survey. In addition, given the variety of libraries surveyed across the TPL system, results are also likely a reflection of users' patterns of usage and perceptions across the system overall. The survey of 2,281 users is accurate to $\pm 2.0\%$, 19 times out of 20

Objectives and Methodology

- ◆ The in-library survey focused on the experience related to respondents visit on the day of the survey, while the general public survey focused on usage in general and non usage.
- ◆ Some questions from the general public survey were repeated in the in library survey to allow for comparisons. However, caution is advised when making comparisons because of the differences between actual users and those who report that they are users. In-library respondents are heavier users of the library than those surveyed among the general public. This is understandable, since heavier users would have had a far greater chance of being selected into the in library survey than lighter users.
- ◆ While surveys are excellent vehicles for measuring attitudes and patterns of usage they are somewhat less reliable when it comes to matters of time related self reported behaviour. Individuals' memories of behaviour and when things took place are often "shaky". Caution is therefore also advised in interpreting patterns of visitation to libraries and other facilities reported in the general public survey. However, since the same bias persists across time and across facilities, comparisons of this types are usually fairly accurate.
- ◆ Proportions may not sum to 100% due to rounding.



Summary

Summary

- ◆ The library remains an integral part of the Toronto community, is highly rated for the quality of its services and seen to be providing important services.
- ◆ The TPL serves a wide range of the population in terms of age and income. It is especially used by students and those in lower income households
- ◆ Library usage remains strong and a quarter of the Toronto adult population can be characterised as heavy users of library services. Visits are down slightly, online access is up strongly and telephone access down strongly.
- ◆ Library visitors typically undertake a wide variety of activities and this contributes to usage, but browsing and borrowing Library materials remain major activities.
- ◆ Use of ebooks is a potentially large and growing market for the Library.
- ◆ There are few complaints about Library services, the only issues are a desire for more computers and ebooks to download.
- ◆ Satisfaction with the various aspects of library service is high and relatively stable over time. Satisfaction with staff is high and services both for the in-library and general public surveys.
- ◆ Libraries are seen by the Toronto public as important and relevant and continuing to provide a valuable service.



Detailed Analysis – Demographic Profiles of Respondents

Demographic Profile

n=	Total Sample			2012		2011 CENSUS
	2001	2006	2012	Public Library Users	Public Library Non-Users	
	%	%	%	%	%	
Age						
18 to 24	10	10	4	5	1	12
25 to 34	20	17	26	27	24	19
35 to 44	25	23	21	21	16	18
45 to 54	17	20	18	19	14	19
55 to 64	10	12	13	12	18	14
65 years or older	16	17	18	15	25	18
MEDIAN AGE	42	44	44	43	50	45
Household Income**						
Less than \$30,000	21	19	21	22	18	-
\$30,000 to just under \$50,000	20	23	21	22	12	-
\$50,000 to just under \$70,000	24	20	15	15	18	-
\$70,000 to just under \$100,000	20	17	18	17	19	-
\$100,000 to just under \$150,000	10	13	17	16	21	-
\$150,000 to just under \$250,000	} 5	} 6	6	6	7	-
\$250,000 or more			3	2	3	-
MEDIAN HOUSEHOLD INCOME	\$57,000	\$57,500	\$60,100	\$57,500	\$71,000	\$52,800

Note: Don't know responses are not shown
 ** Proportions exclude don't know/no answer and refused responses.

Demographic Profile

n=	Total Sample			2012		2011 CENSUS
	2001	2006	2012	Public Library Users	Public Library Non-Users	
	%	%	%	%	%	%
Education*						
High school or less	27	22↓	40	36	48	45
Some college/university	29	28	30	29	30	26
University Graduate	43	48↑	29	34	19	29
Gender						
Male	50	50	47	41	63	47
Female	50	50	52	58	37	53
Canadian immigrants						
Non-immigrants	60	60	50	48	55	-
Immigrants	39	38	49	51	45	-
Number of years lived in Canada (n=481)						
10 years or fewer	n/a	27	7	8	3	-
More than ten years	n/a	73	92	91	97	-
English first language spoken at home						
Yes	70	66↓	72	66	86	54
No	29	32	28	34	14	46

Note: Don't know responses are not shown

* Statscan data is based on the population of those 20-64 years of age

** Includes: less than high school graduation certificate, with a high school grad certificate and/or some postsecondary

Demographic Profile

n=	Total Sample			2012		2011 CENSUS
	2001	2006	2012	Public Library Users	Public Library Non-Users	
	1251	1255	1220	895	325	%
	%	%	%	%	%	%
Employment status						
Work full time	55	51	48	46	53	} 60
Work part time	9	11	10	12	6	
Retired	18	17	20	17	28	-
Student	8	10	6	8	1	-
Unemployed and looking for work	3	3	6	6	6	8
Homemaker	4	2	4	5	<1	-
On maternity/parental leave	n/a	1	0	0	0	-
Unemployed and not looking for work	1	<1	3	3	1	-
Work status						
Employee	-	-	48	47	50	-
Self employed	-	-	8	9	7	-
Business owner	-	-	2	2	2	-
Other	-	-	<1	<1	<1	-
Have children						
Children aged <12 years	-	-	19	24	5	-
Children aged 13 – 17 years	-	-	9	10	3	-

Note: Don't know responses are not shown



Detailed Analysis – Usage and Non Usage of Libraries

Regular (once a month or more) library visiting is down 7 points since 2001

Note: Ranking of locations is based on 2012 – once a week results

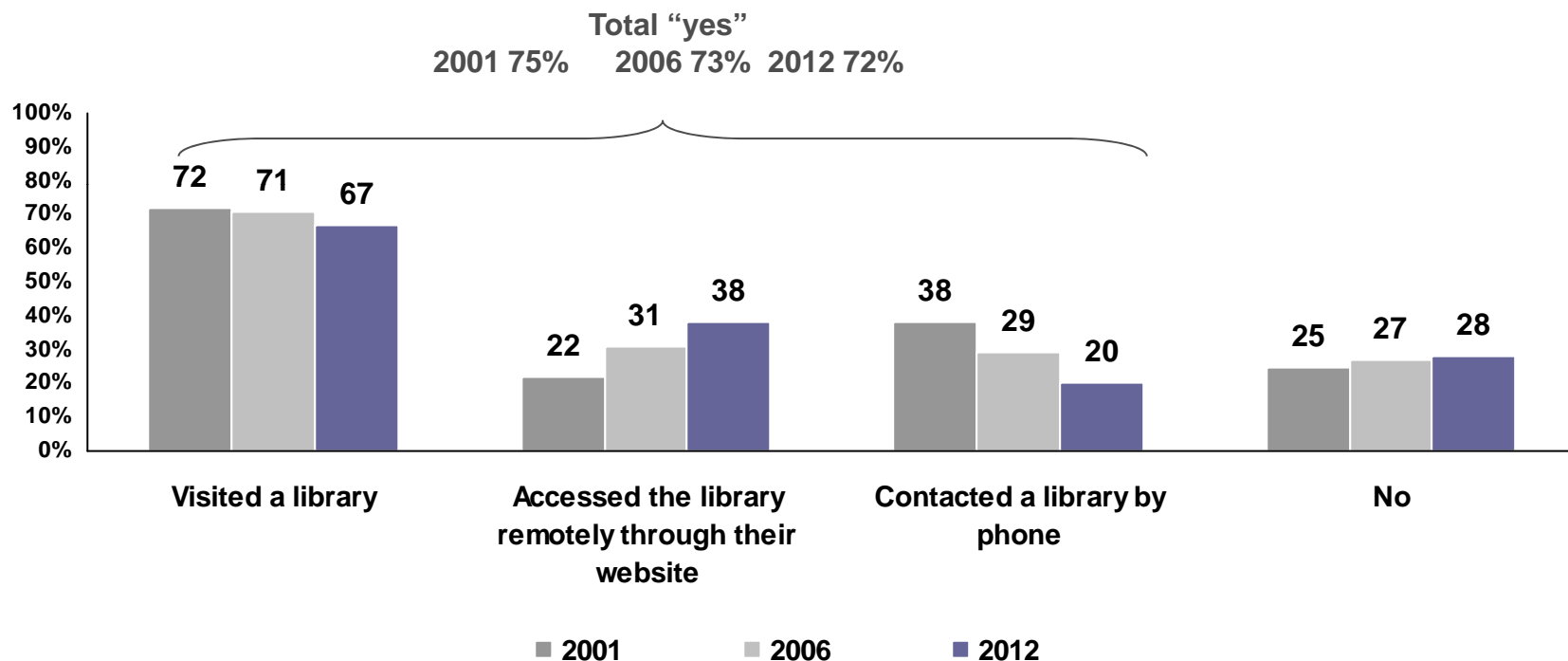
	Total Sample												
	Once a week			Once a month			2 to 3 times a year			Less than once a year			Once a month + Change
	2001	2006	2012	2001	2006	2012	2001	2006	2012	2001	2006	2012	2001-2012
	%	%	%	%	%	%	%	%	%	%	%	%	%
A public library	20	18	16	29	28	26	23	20	25	26	33	29	-7
A community centre	15	16	15	10	10	9	17	13	15	54	56	46	-1
A book store	21	16	12	44	39	30	21	26	34	14	18	20	-23
A movie theatre	9	5	3	36	31	29	30	36	36	24	26	27	-13
An art gallery or museum	2	2	0	8	8	6	32	31	32	56	56	53	-4

Q1-5. How often do you visit the following types of locations in Toronto? (Formerly Q.1-7) I'd like to begin by asking you how often you visit the following types of locations. Please respond by telling me if you go at least once a week, at least once a month, 2 or 3 times a year, or less than once a year. On average how often do you go to...

Base: Total sample (2001 n=1251; 2006 n=1255; 2012 n=1220)

Note: "Don't know" responses are not shown.

Visits to a library (at least once in the last year) is down 5 points since 2001, but remote online access is up significantly



Q7. In the past year, have you accessed a public library in Toronto in any of the following ways? (Formerly Q.9) In the past year, have you visited a branch of the Toronto public library, accessed the library via online or contacted the library by telephone?

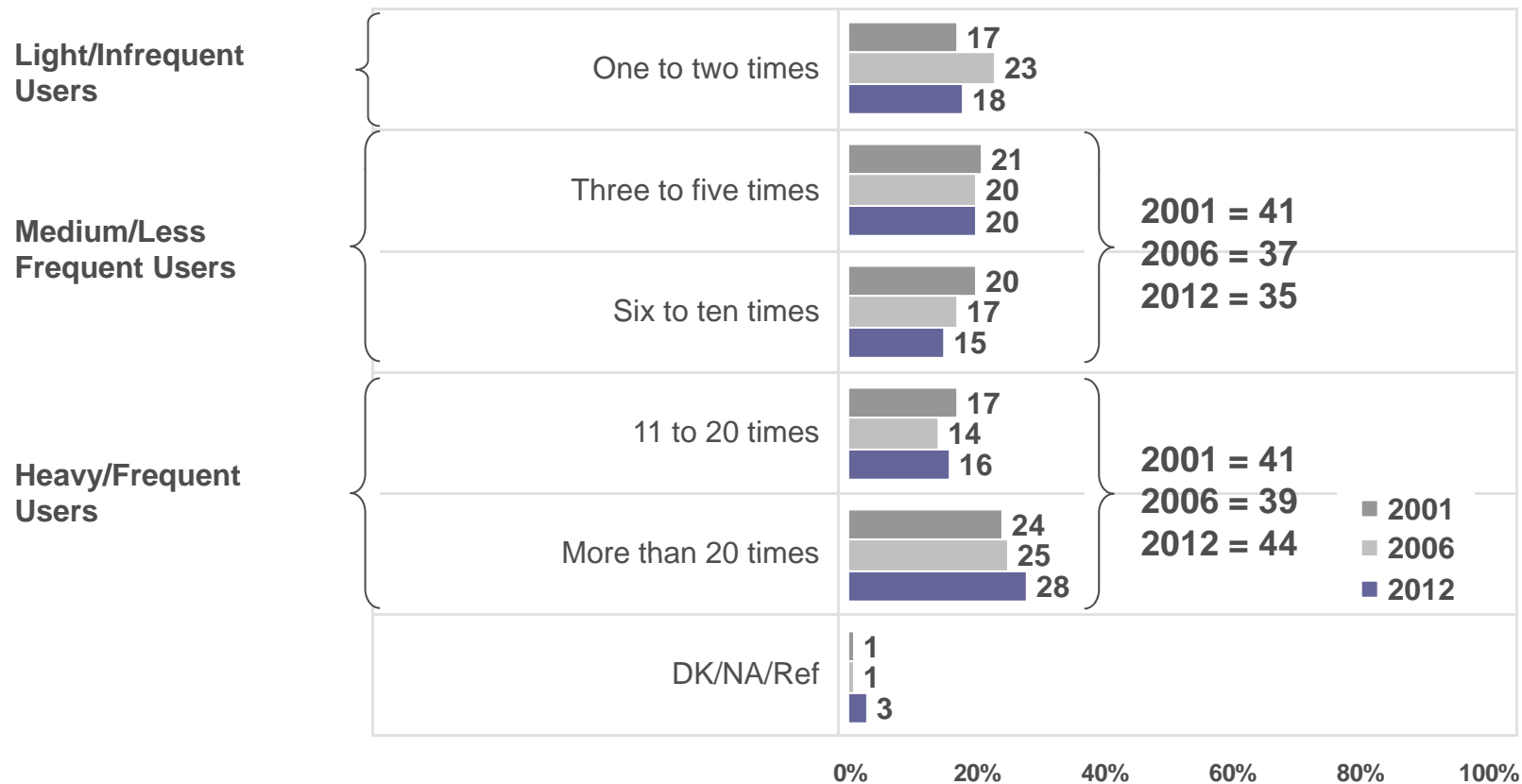
Base: Total sample (2001 n=1250; 2006 n=1255; 2012 n=1220)

* Wording change in 2006

Note: Multiple responses accepted

Close to half (44%) visitors to a library in the last year can be described as Frequent Users. This translates into 31% of the Toronto adult population.

Among those who have visited a public library in the past year



Q9. Do you recall how many times you have personally visited a Toronto Public Library in the past year? (Formerly Q.10) Do you recall how many times you have personally visited a Toronto Public Library in the past year? Would you say one to two times, three to five times, six to ten times, 11 to 20 times or more than 20 times?
 Base: Those who visited a public library in the past year (2001 n=905; 2006 n=889; 2012 n=856)

For most visitors location is key to visiting.

	Total
n=	2281
	%
It is closest to where I live	56
It is conveniently located	14
It has helpful staff	8
It has a good selection of books and other material	6
It is closest to where I work	5
It has a good reading/work/study area	3
It has convenient hours	2
It is easy to get access to a computer	2
Other	6

Q11. What is the main reason you use this branch?
 Base: Total sample (excludes no answers)



Detailed Analysis – Awareness and Usage

Awareness of specific library services varies greatly and is especially notable regarding ebooks to download.

Note: Ranking of services offered is based on 2012 – total sample results

	Total Sample			
	Total	Visitor in Past Year	No Visits in Past Year	Gap**
	2012	2012	2012	2012
n=	1220	895	325	
	%	%	%	%
CDs, DVDs that can be borrowed*	84	89	68	21
Free use of computers with Internet in every branch*	81	86	68	18
Best selling books that can be borrowed	78	87	55	32
Space to work	70	74	58	16
Current magazines and newspapers in many languages	65	72	48	24
Reserve or renew books online	67	76	42	34
Access to the library's catalogue online	67	71	39	32
Programs for adults on a variety of subjects and interests*	56	63	36	27
Access to newspaper and magazine articles online	56	60	42	18
Wireless access	55	63	35	28
Meeting rooms/event space available for rental	48	57	25	32
Book clubs for all ages	50	53	41	12
Ebooks to download	42	48	24	24
DK/NA/Ref	7	-	20	-

Q6. To the best of your knowledge, which services are you aware of that the public libraries in Toronto offer to residents of the city? (Formerly Q.8) Now, for the following I'd like you to tell me, to the best of your knowledge, which services the public libraries in Toronto offer to residents of the city.

Base: Total sample

Note: Multiple responses accepted. In 2001 each service was asked as an individual yes, no, or don't know response and this accounts for the range of don't know responses.

* Wording change in 2006

** The difference in awareness levels between the visitors and non-visitors expressed in percentage points

Visitors use libraries for a variety of purposes, but borrowing continues to be a major service.

	Those who have visited a public library in the past year	Visited 2-3 Times
	2012	2012
	n= 856	247
	%	%
Browse for books of interest to borrow*	61	57
Pick up specific items that are on hold for you	48	34
Get information on a topic of personal interest	37	32
Browse for CDs, DVDs, or videos to borrow*	39	27
Find a quiet place to study or read*	30	26
Use the computers*	29	24
Find specific information for school or work	25	25
Read newspapers and magazines	26	22
Take a child to the library*	28	32
Space to work	18	19
Personally attend a lecture, meeting or program	15	11
Meet people	10	9
Volunteer, Donate Time/Books	1	0
Other	1	1

Q10. (Formerly Q.12) When you visit the library is this usually to ...

Base: Those who have visited a public library in the past year

* Wording change in 2006

Visitors typically undertake a wide variety of activities, but browsing for material to borrow, borrowing, returning and renewing library materials remain major activities. In essence, borrowing continues to be the core library service, but in addition one third made use of a library computer during their visit, while one-in-seven used their own laptop.

	Total
n=	2281
	%
Borrowed/renewed library materials	56
Returned library materials	42
Browsed for books of interest to borrow	42
Used a library computer	35
Interacted/spoke with staff	28
Browsed for CDs or DVDs to borrow	25
Used books and other items (newspapers/magazines) for personal interest	23
Used the library as a place of study	17
Came to sit and relax	15
Used your own laptop, but linked into the libraries wireless system	14
Asked staff a reference question	13
Placed an item on hold	13
Brought a child to the library	10
Borrowed/returned/renewed material in another language	8

Q2. Which of the following activities did you do while here today?
 Base: Total sample (excludes no answers)

Activities undertaken during visit (Cont. from slide 20)

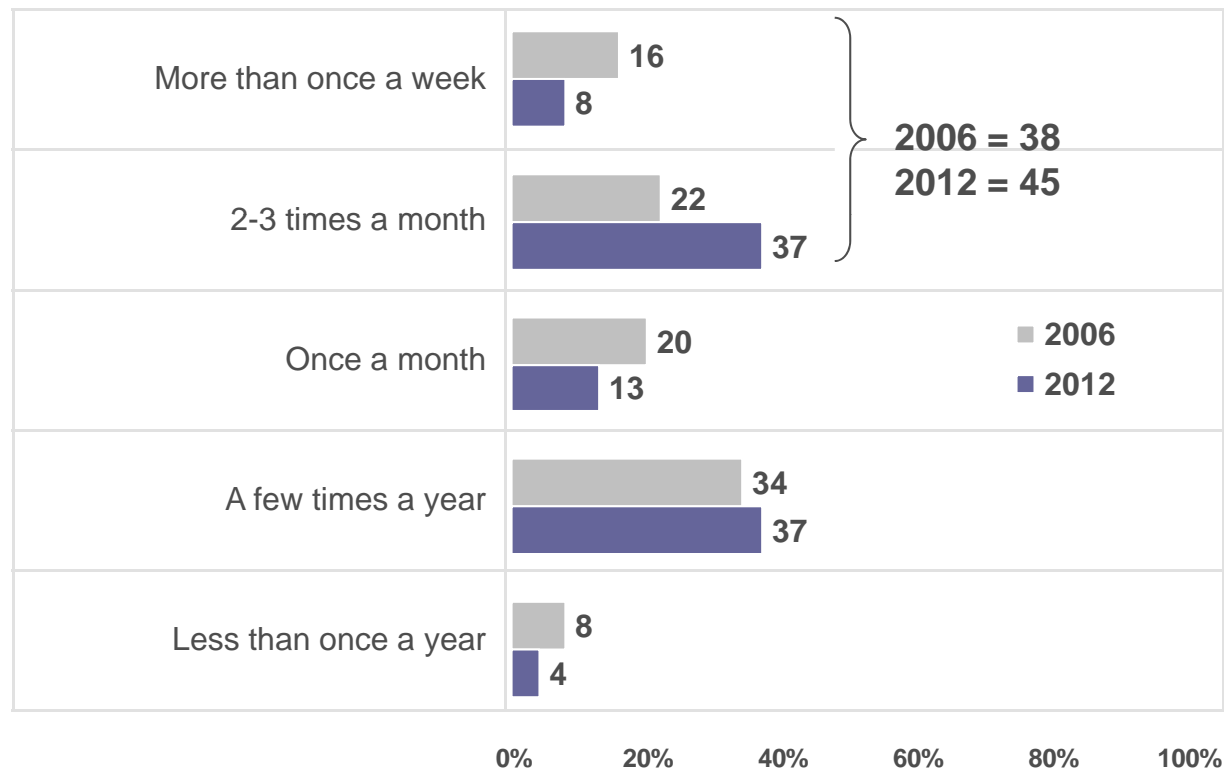
	Total
n=	2281
	%
Obtained information about events and services in or about the community	8
Used books and other items (newspapers/magazines) for school related reasons	7
Used the library as a place of work	7
Came to meet friends/socialize	7
Used books and other items (newspapers/magazines) for business related reasons	6
Used the library resources to confirm something I had read online	6
Came to find information/help related to finding a job/new job	5
Attended a program/event/exhibition	5
Other	2

Q2. Which of the following activities did you do while here today?
 Base: Total sample (excludes no answers)

Frequency of Taking a Child to the Library has changed; the number of frequent visitors taking a child to the library has increased

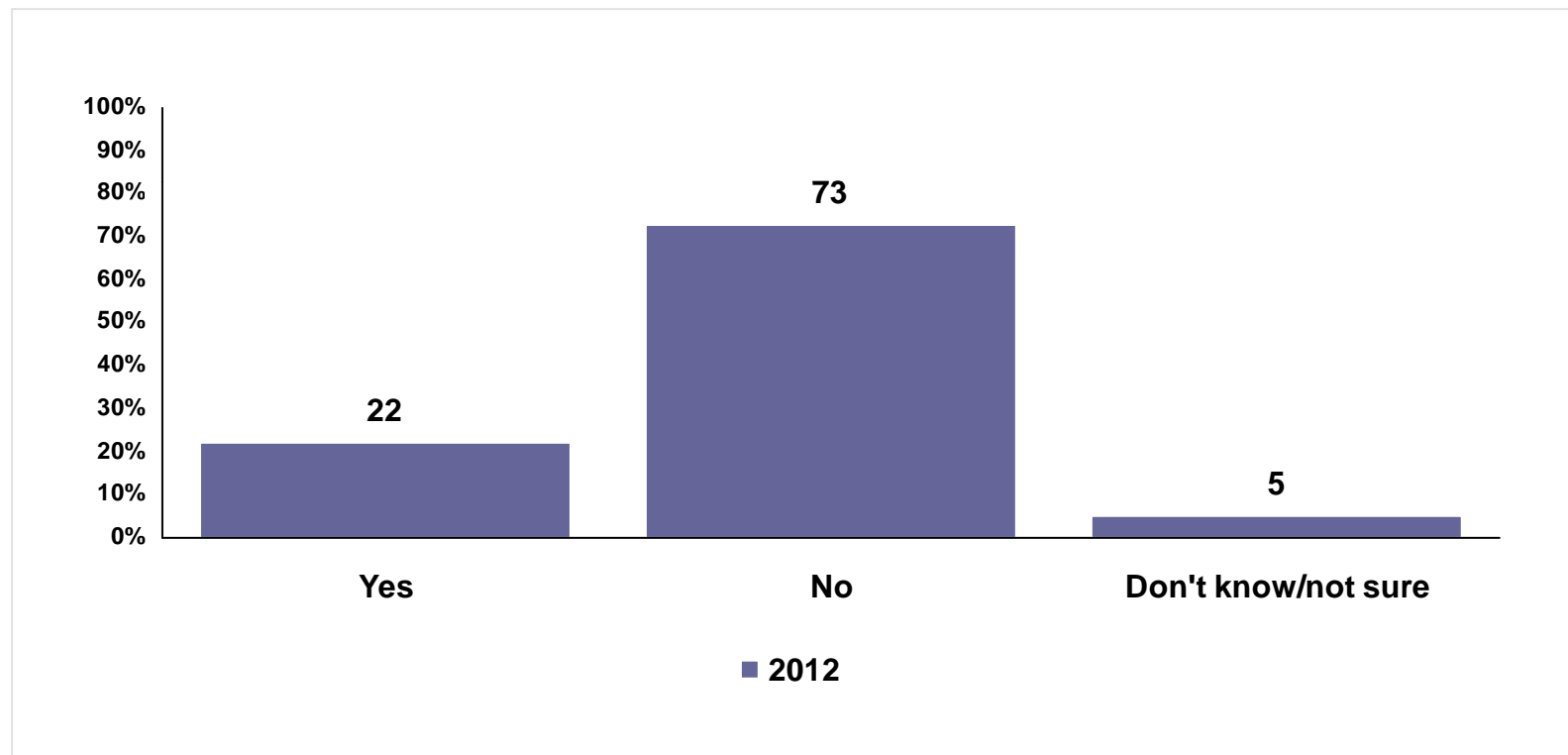
Among those who indicate they take a child to the library

Heavy/ Frequent Users



Q11. (Formerly Q.13) How often do you take a child to the library?
 Base: Those who take a child to the library (2006 n=316; 2012 n=215)
 Note: don't know /no answer responses are not shown

One-in-five Torontonians report using a library to validate information they found on the internet.



Q74. After searching for and finding information on the Internet, have you ever then gone to a public library to validate the information?
 Base: Total sample (2012 n=1220)



Detailed Analysis – Online Usage

A substantial proportion of library visitors read books in an electronic format. As expected, this is highly age dependent. Among the general public, only 30% report this type of activity.

% Yes

	Total	Age						Gen Pop	
		18-24	25-34	35-44	45-54	55-64	65-74	75+	2012
	2281	276	390	455	449	331	237	110	1220
	%	%	%	%	%	%	%	%	%
Read books	43	55	54	52	39	30	23	23	30
Listen to music	51	76	64	59	50	38	26	17	n/a
Listen to books	21	21	27	27	21	15	8	12	n/a

Q23. Do you do any of the following online through a computer, e-reader, mobile device or tablet?
 Base: Total sample (excludes no answers)

Among library visitors who report not reading books in an electronic format, there is some interest in reading e-books in the next year.

	Total	Age						
		18-24	25-34	35-44	45-54	55-64	65-74	75+
n=	1252	123	176	211	268	214	171	81
	%	%	%	%	%	%	%	%
TOTAL LIKELY	23	20	22	31	26	27	16	14
Very likely	9	5	4	13	8	12	9	6
Somewhat likely	15	15	18	18	19	14	7	7
Not too likely	23	19	26	26	25	18	27	21
Not very likely	33	29	31	25	34	32	39	42
TOTAL NOT LIKELY	56	48	57	51	59	50	66	63
I already read books online	0	2		0		0		
DK/NA/Ref	20	31	22	18	15	23	18	23

Q28. How likely are you to begin reading e-books over the next year?
 Base: Those who report not reading e-books (excludes no answers)

Among library visitors saying they are at least somewhat interested in ereading in the next year, the library appears to be a natural source for downloading such books.

	Total	Age				
		18-24	25-34	35-44	45-54	55+
n=	292	24	38	64	71	95
	%	%	%	%	%	%
TOTAL LIKELY	91	96	97	92	92	84
Very likely	57	42	55	59	49	65
Somewhat likely	34	54	42	33	42	19
Not too likely	7	4	3	6	7	11
Not very likely	2			2	1	5
TOTAL NOT LIKELY	9	4	3	8	8	16

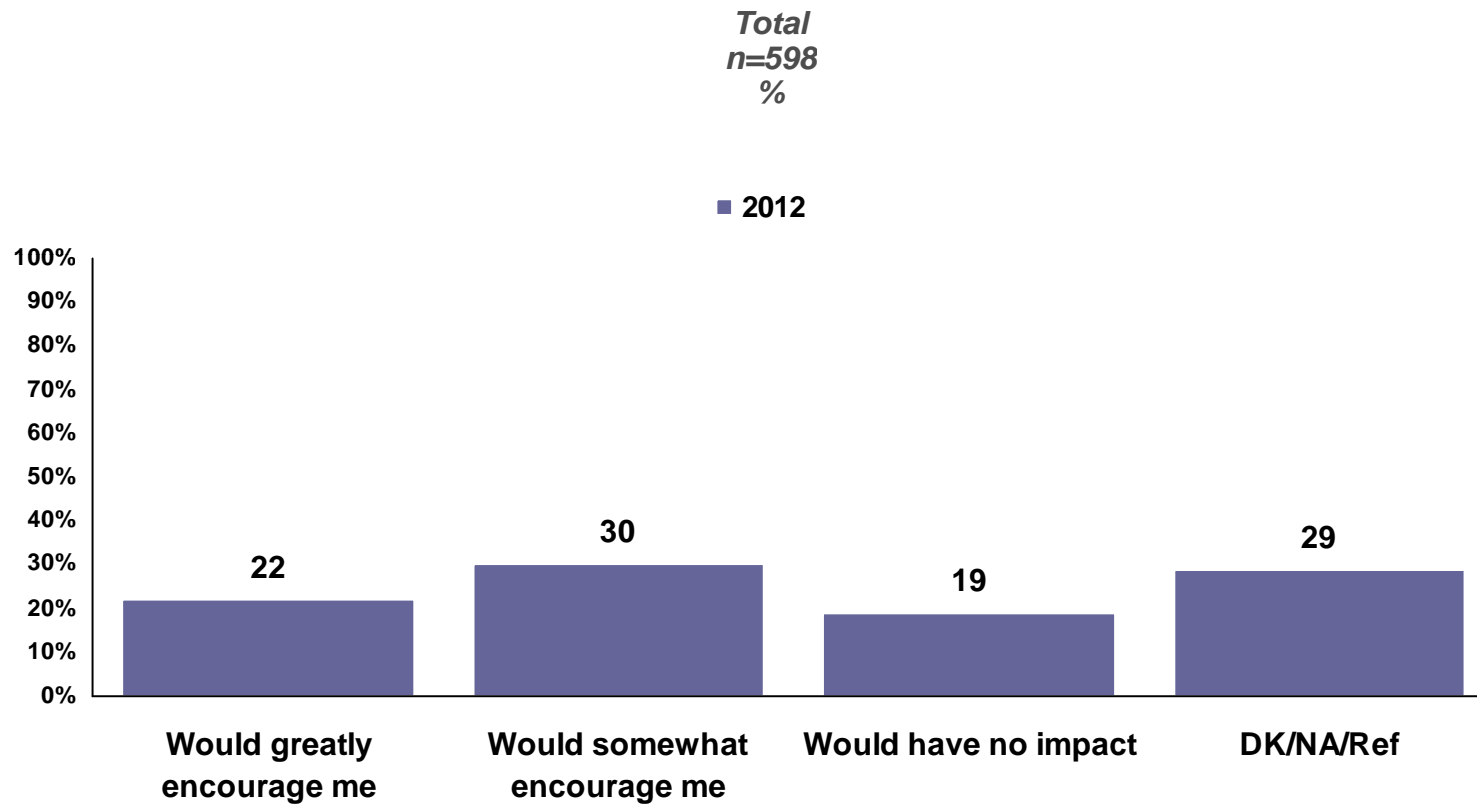
Q29a. If you were to start to read e-books through a tablet, e-reader or computer, how likely would you be to download books from Toronto Public Library website?
 Base: Those saying they are likely to read books electronically in the next year (excludes no answers)

Among library visitors who are current ebook readers there is also interest in downloading from the library website.

	Total	Age				
		18-24	25-34	35-44	45-54	55+
n=	672	124	160	158	110	112
	%	%	%	%	%	%
TOTAL LIKELY	59	46	59	65	60	62
Very likely	28	17	31	31	28	30
Somewhat likely	31	29	29	34	32	32
Not too likely	24	28	28	23	20	20
Not very likely	17	26	13	11	20	18
TOTAL NOT LIKELY	41	54	41	35	40	38

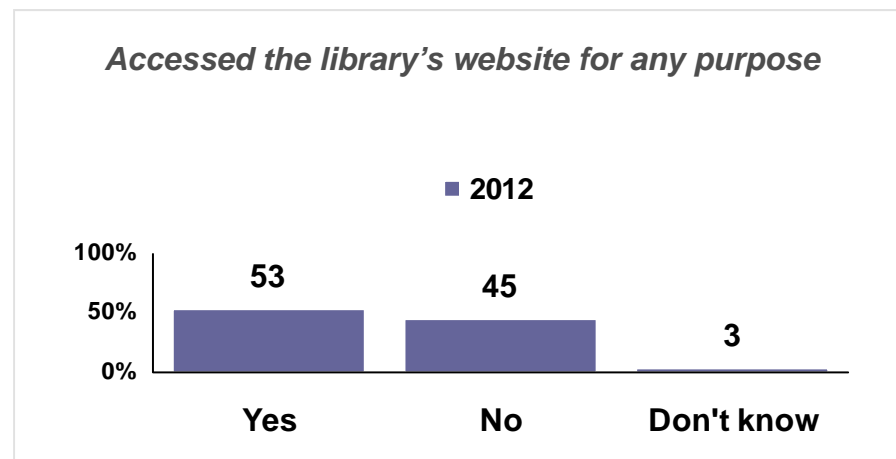
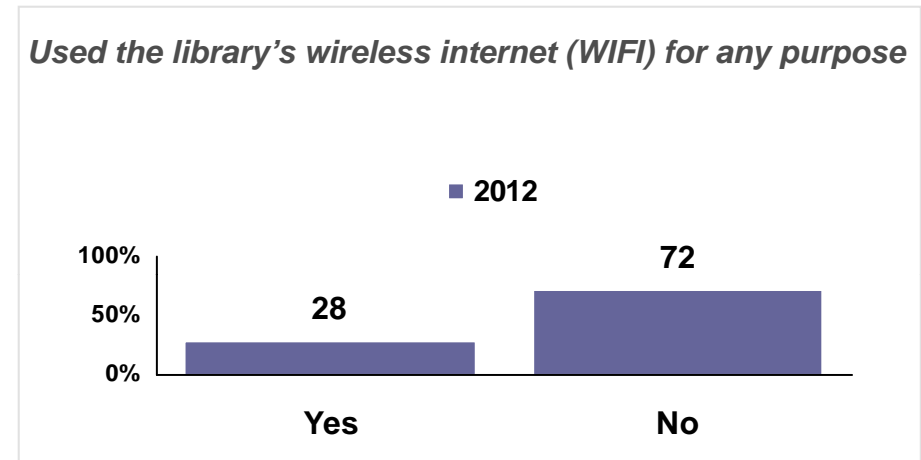
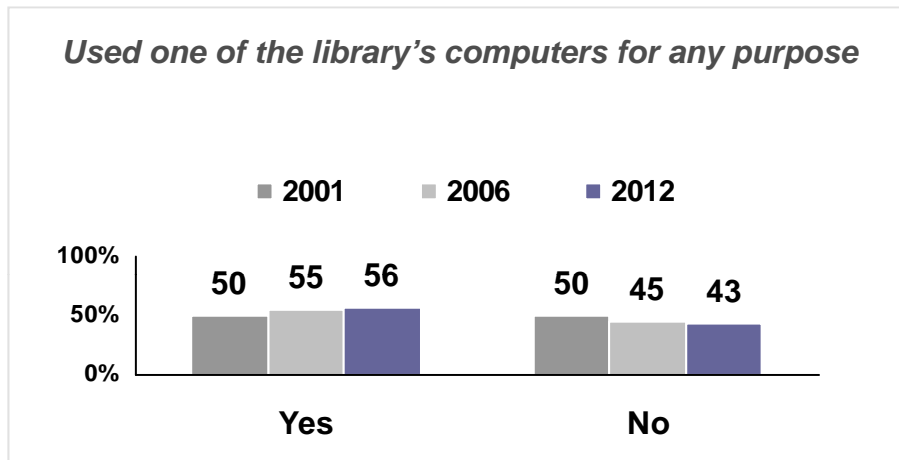
Q29b. How likely are you to download e-books from the Toronto Public Library website in the next year?
 Base: Current e-book readers (excludes no answers)

Among library visitors, a technical support service for electronic books appears to be of some interest to potential library e-book readers.



Q30. If the library had a technical support service for electronic books would this encourage you or not to download e-books from the library?
 Base: Those interested in downloading from the library website (excludes no answers)

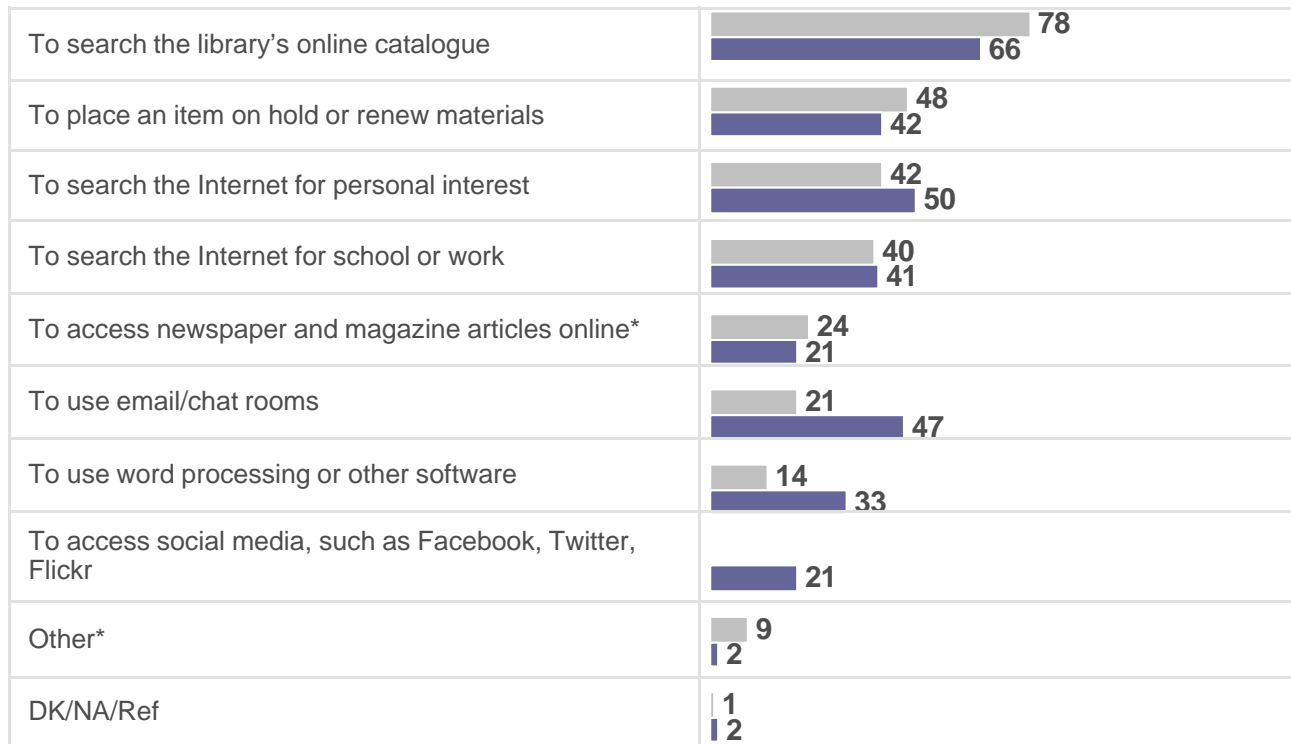
Usage of library computers among general public library visitors is quite extensive as is use of the library website.



Q12. (Formerly Q.14) When you have visited a public library have you:
 Base: Those who have visited a public library in the past year (2001 n=905; 2006 n=889; 2012 n=829)

Usage of library computers for email and word processing has increased significantly since 2006.

How Library Computers Are Used



0% 20% 40% 60% 80% 100%

■ 2006 ■ 2012

Q13. When you have used a computer at the library, your own or the library's, what did you use it for? (Formerly Q.15) When you have used a computer at the library, what did you use it for?

Base: Those who have used a computer at the library in the last year (2001 n=456; 2006 n=488; 2012 n=601)

Note: Multiple responses accepted

* Other includes mentions of 2% or less

There are four or five main uses of the TPL web site.

Note: Ranking of web site services used is based on 2006 results

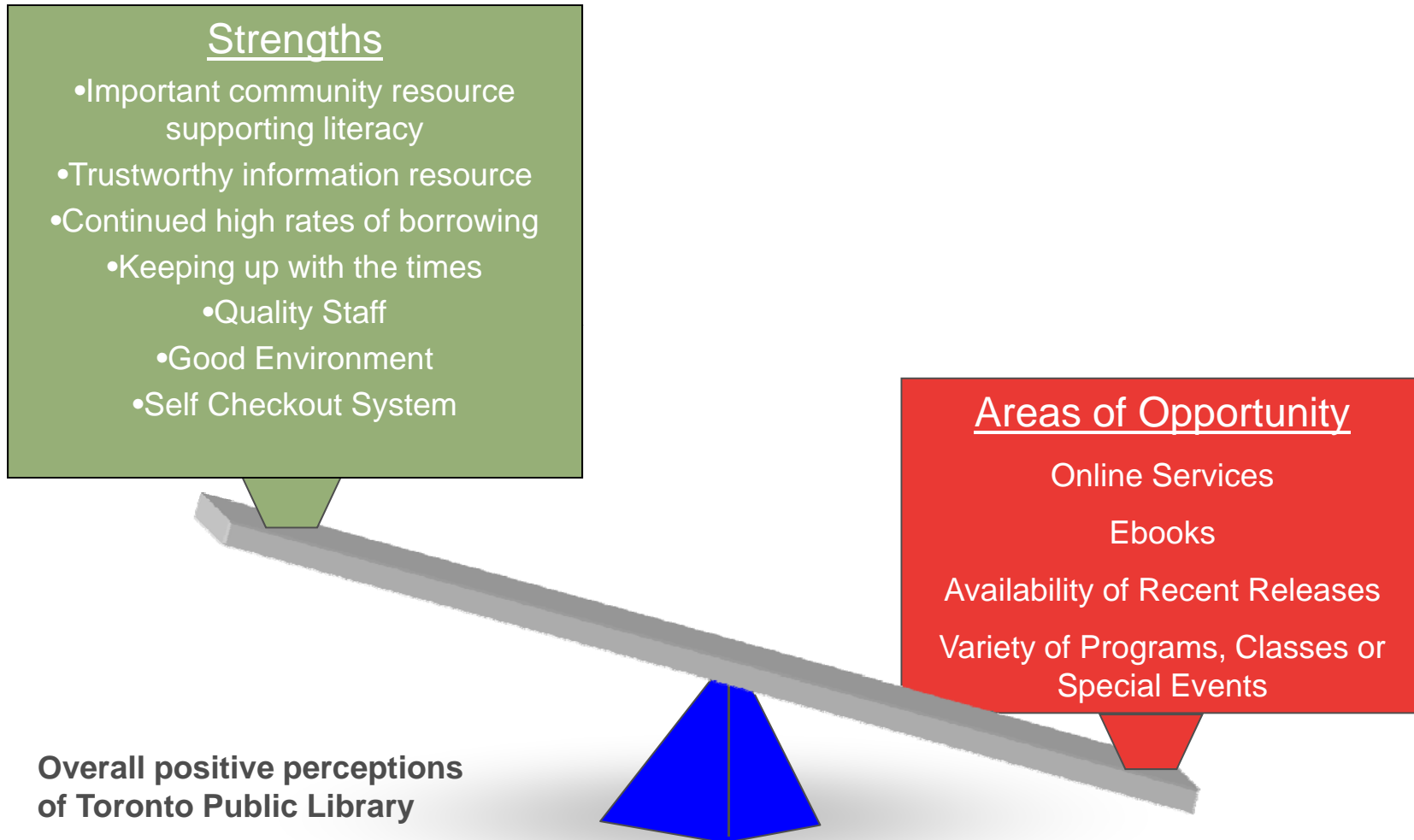
	Those who have accessed the Toronto Public Library web site		
	2001	2006	2012
n=	272	387	692
	%	%	%
Searched the library's catalogue for an item	75	83	76
Placed an item on hold	50	67	55
Renewed an item	48	65	47
Found out about the library's hours and services	47	65	63
Reviewed your customer record	33	53	43
Accessed newspaper and magazine articles online*	36	19	10
Downloaded an ebook	n/a	n/a	14
Ordered tickets for a library program	n/a	n/a	8
Accessed historical images and other digital documents from the library's Digital Archives	n/a	n/a	12
Other	4	9	1

Q16. (Formerly Q.17) And what services on the library's web site have you made use of?
 Base: Those who have accessed the Toronto Public Library web site
 * Wording change in 2006



Detailed Analysis – Attitudes Towards TPL

The Toronto Public Library strengths easily outweigh any issues.



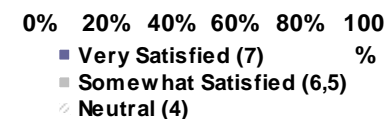
Overall positive perceptions of Toronto Public Library

- **Direction for the future: Maintain the strengths while working on the areas of opportunity**

Satisfaction with Toronto Public Library services is high and stable.

Note: Ranking of satisfaction with services is based on 2006 total satisfied results

Total Satisfied (7,6,5) %				2012			Total Dissatisfied (3,2,1) %	DK/NA/Ref %
2001	2006	2012		Very Satisfied (7)	Somewhat Satisfied (6,5)	Neutral (4)	2012	2012
90	93	92	The helpfulness of library staff*	55	37	3	5	5
n/a	93	91	The knowledge of library staff	52	39	3	4	10
n/a	93	97	Overall quality of public library service in Toronto	48	48	2	1	6
86	90	89	The variety of books and other materials available to borrow	42	47	7	3	5
91	90	95	The attractiveness and cleanliness of the library I use*	53	42	4	1	3
76	85	84	The Toronto Public Library web site**	33	51	13	3	21
73	78	90	The number of recently published books available to borrow*	33	56	5	5	18
n/a	76	84	The hours of operation of my local library	34	50	8	8	5
69	73	83	The variety of programs and classes offered*	33	50	15	2	46
n/a	56	72	Recently released DVDs and CDs are available	26	47	13	15	39



Q17-31. How satisfied are you with each of the following aspects of the Toronto Public Library and its services? (Formerly Q.18-29) Now, I'd like to ask you how satisfied you are with each of the following aspects of the Toronto Public Library and its services. You can do this by giving me a number between one and seven in which "7" means you are very satisfied and "1" means that you are not at all satisfied.

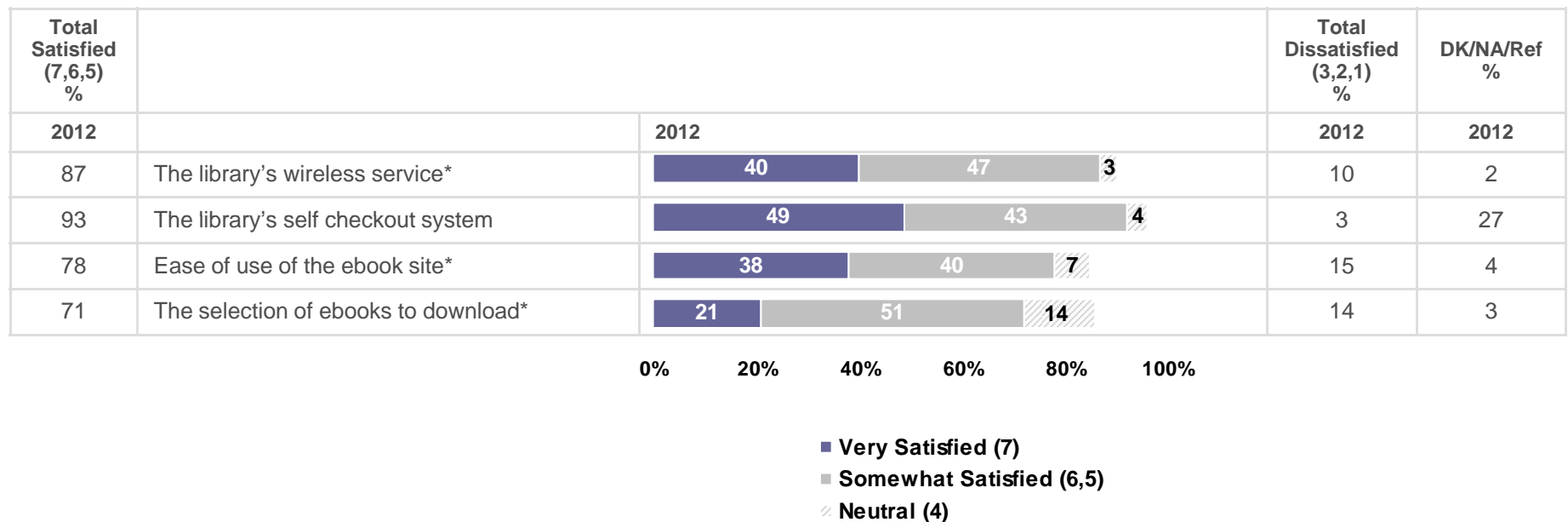
Base: Those who have visited a library, accessed a library online or contacted a library by telephone in the past year

Note: Proportions have been recalculated to exclude "don't know" and "no answer" responses

* Wording change in 2006 ** Accessed website

Satisfaction with Toronto Public Library services (cont.)

Note: Ranking of satisfaction with services is based on 2006 total satisfied results



Q17-31. How satisfied are you with each of the following aspects of the Toronto Public Library and its services? (Formerly Q.18-29) Now, I'd like to ask you how satisfied you are with each of the following aspects of the Toronto Public Library and its services. You can do this by giving me a number between one and seven in which "7" means you are very satisfied and "1" means that you are not at all satisfied.

Base: Those who have visited a library, accessed a library online or contacted a library by telephone in the past year

Note: Proportions have been recalculated to exclude "don't know" and "no answer" responses

* Smaller sample sizes due to user's using specialized services.

Attitudes toward The Toronto Public Library show its importance as a community resource and its continuing relevance.

Note: Ranking of attitudes is based on 2006 total agree results

Total Agree %				2012	Total Disagree %	DK/NA/Ref %
2001	2006	2012				
98	97	92	Public libraries are an important resource for the community		2	1
n/a	93	89	Libraries are an important support for elementary and high school students		3	2
n/a	93	91	Libraries support literacy		1	3
n/a	81	78	Among Users Only: I am easily able to finding information by myself in the library (n=873)		8	4
78	74	84	Among Users Only: I really like using public libraries in Toronto (n=873)		3	2
-	-	23	Among Users of eBooks: I expect my use of libraries to decrease as I use ebooks more (n=266)		55	2
-	-	91	The library is a trustworthy source of information		2	1
43	44	30	I know very little about the services that public libraries offer		52	2

0% 20% 40% 60% 80% 100%

■ Strong Agree
 ■ Somewhat Agree
 ▨ Neither

Q34-46. For each of the following statements, please indicate your level of agreement or disagreement? (Formerly Q.30-44) For each of the following statements would you please tell me if you agree or disagree. You can do this by telling me if you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree or strongly disagree. This first is ...

Base: All respondents (2001 n=1251; 2006 n=1255; 2012 n=1220)

* Wording change in 2006

Attitudes Toward The Toronto Public Library (cont.)

Note: Ranking of attitudes is based on 2006 total agree results

Total Agree %				2012			Total Disagree %	DK/NA/Ref %
2001	2006	2012		2012			2012	2012
38	39	30	I prefer to buy books rather than borrow from a public library	14	16	21	46	3
25	33	26	I almost never think about using a library	13	13	13	60	1
23	24	18	The Internet has made libraries irrelevant	8	10	14	64	4
16	18	14	Libraries are out of touch with the needs of people today	5	9	13	64	9
14	18	11	Public libraries seem overcrowded and noisy*	4	8	18	61	9



Q34-46. For each of the following statements, please indicate your level of agreement or disagreement? (Formerly Q.30-44) For each of the following statements would you please tell me if you agree or disagree. You can do this by telling me if you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree or strongly disagree. This first is ...

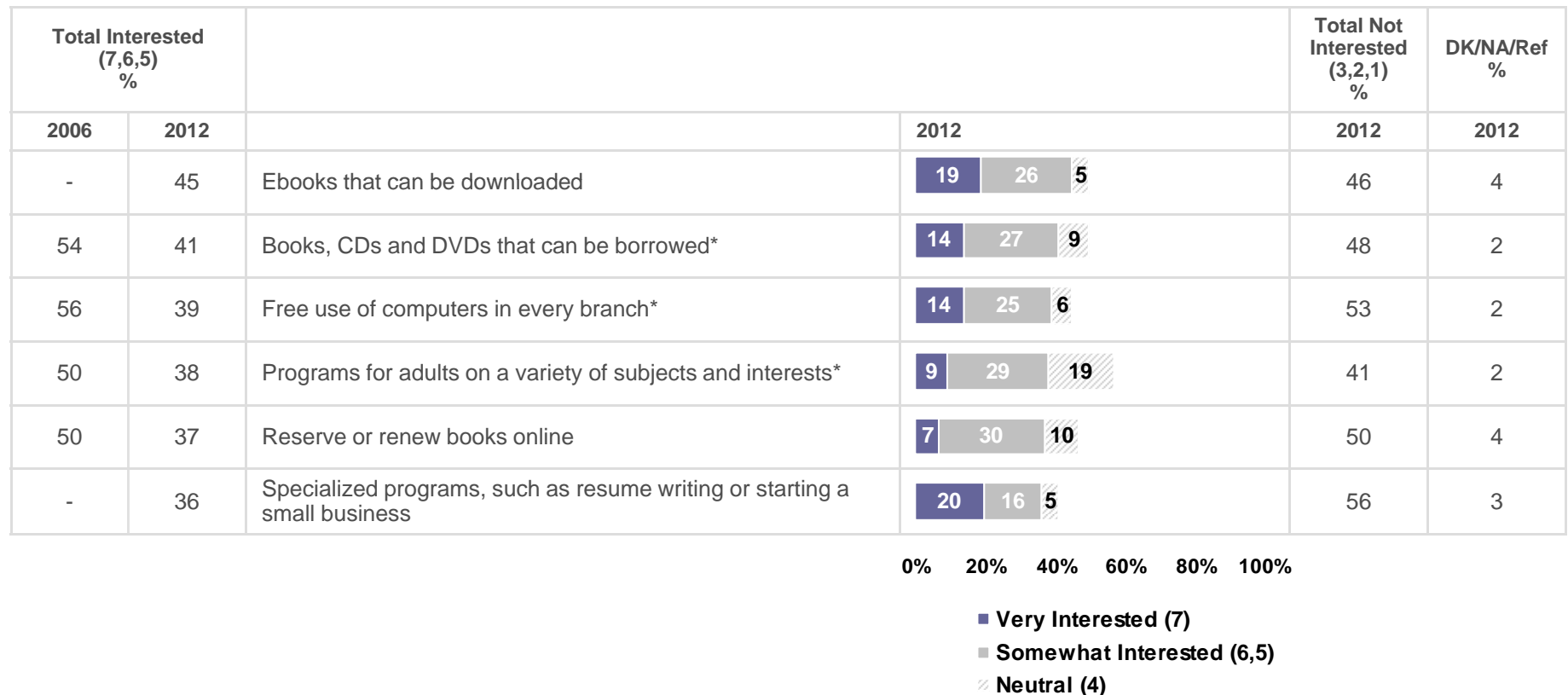
Base: All respondents (2001 n=1251; 2006 n=1255; 2012 n=1220)

* Wording change in 2006



Detailed Analysis – Building Demand

Ebooks to download, specialized programs, material to borrow, and free use of computers are all of some interest to non-users.



Q47-60. (Formerly Q.45-58) The Toronto Public Library system provides a wide range of services. For each of the following services can you please indicate/tell me how interested you are in making use of these services personally or with your family? You can do this by giving me a number between one and seven in which "7" means you are very interested and "1" means you are not at all interested. The first is ...

Base: Non-users (2006 n=334; 2012 n=325)

* Wording change in 2006

Interest in Specific Services: Non-users (Cont.)

Total Interested (7,6,5) %						Total Not Interested (3,2,1) %	DK/NA/Ref %
2006	2012		2012			2012	2012
58	35	Help with school assignments for children and teens	27	13	4	56	5
-	35	Use of library for job seeking information	21	14	6	55	3
49	32	Storytime and other programs for children*	20	13	6	55	5
-	29	Use of library for business use	5	24	7	59	4
41	28	Access to word processing and other software	10	19	9	60	3
46	26	Access to newspaper and magazine articles online	7	16	14	58	2
43	26	Courses on how to search the Internet	18	8	8	63	2
42	18	Current magazines and newspapers in many languages	9	10	16	62	3

0% 20% 40% 60% 80% 100%

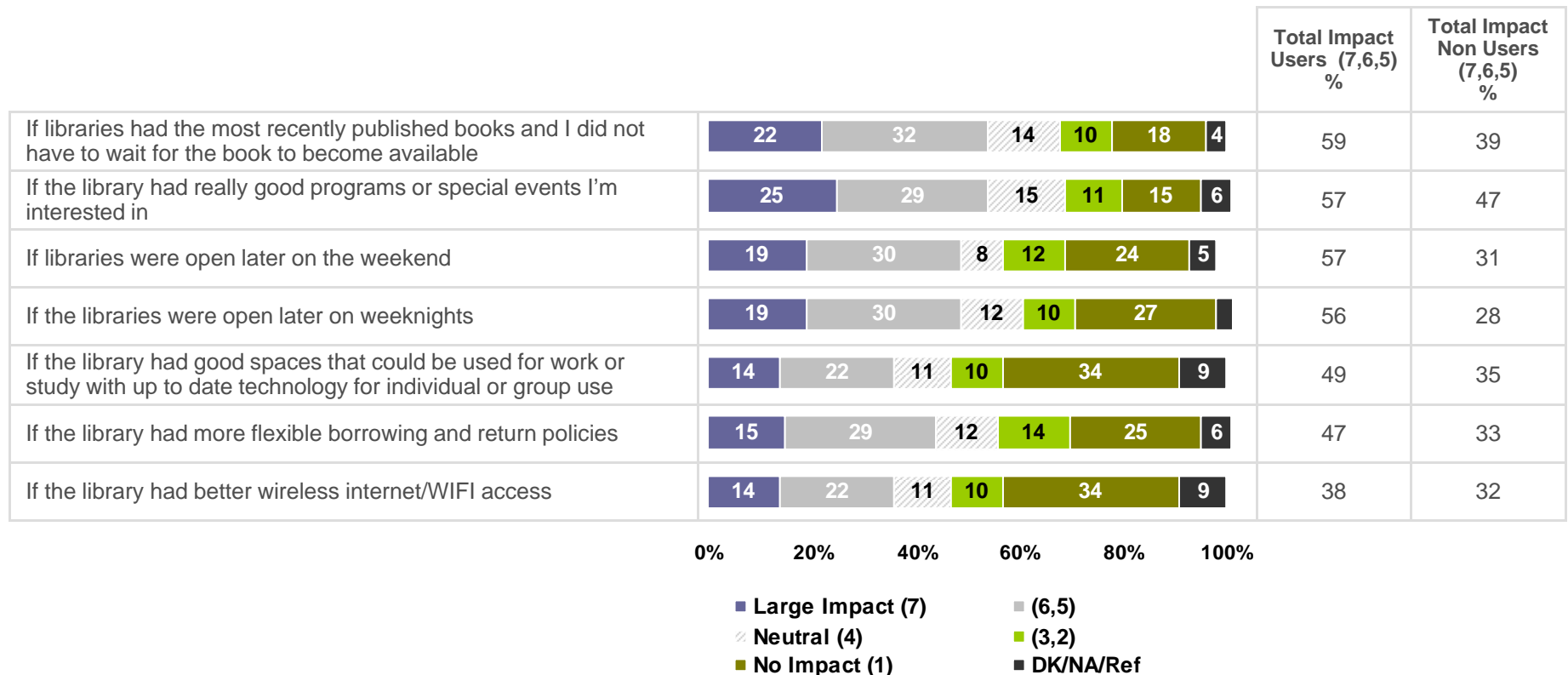
- Very Interested (7)
- Somewhat Interested (6,5)
- ▨ Neutral (4)

Q47-60. (Formerly Q.45-58) The Toronto Public Library system provides a wide range of services. For each of the following services can you please indicate/tell me how interested you are in making use of these services personally or with your family? You can do this by giving me a number between one and seven in which "7" means you are very interested and "1" means you are not at all interested. The first is ...

Base: All respondents (2001 n=1251; 2006 n=1255; 2012 n=325)

* Wording change in 2006

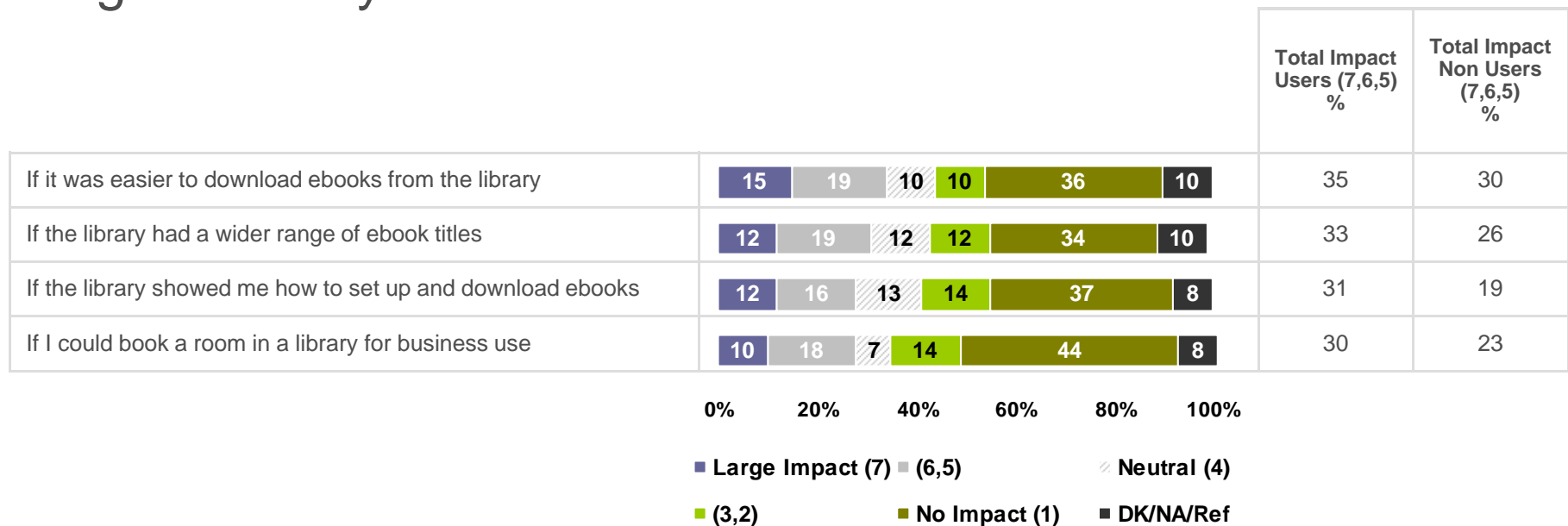
Programs/special events and easily available, recently published books are potential draws for non users.



Q62-72. For the following, please indicate how much of an impact each would be in encouraging you to use a public library? (Formerly Q.62-68) And for the following, can you please tell me how much of a factor each would be in encouraging you to use a public library more often? You can respond by again giving me a number between one and seven in which seven means it would have a large impact and one means it would have not impact on your use of Toronto Public libraries. This first is ...

Base: Total sample and users (n=895) and non-users (n=325)

Among those downloading ebooks, over a quarter (28%) say that if it were easier to download ebooks from the library and there were more titles available this would have a large impact on their usage of library services.



Q62-72. For the following, please indicate how much of an impact each would be in encouraging you to use a public library? (Formerly Q.62-68) And for the following, can you please tell me how much of a factor each would be in encouraging you to use a public library more often? You can respond by again giving me a number between one and seven in which seven means it would have a large impact and one means it would have not impact on your use of Toronto Public libraries. This first is ...

Base: Total sample and users (n=8895 and non-users (n=325)

Preferred hours of operation show that weekdays are important and weekends to a lesser extent.

	Users		Non-users		All	
	Most	2nd	Most	2nd	Most Preferred	Second Most Preferred
	2012		2012		2012	
n=	895		325		1220	
	%	%	%	%	%	%
Weekdays between 9:00 and 1:00	20	6	21	9	20	7
Weekdays between 1:00 and 6:00	24	17	15	14	22	16
Weekdays between 6:00 and 8:30	29	16	33	9	30	14
Saturdays between 9:00 and 1:00	5	9	6	8	5	9
Saturdays between 1:00 and 5:00	11	24	13	23	11	24
Sundays between 1:30 and 5:00	11	27	13	37	11	30

Q73. Which of the following times for visiting the library would be the most and second most preferred by you?
 Base: (2012 n=1220)

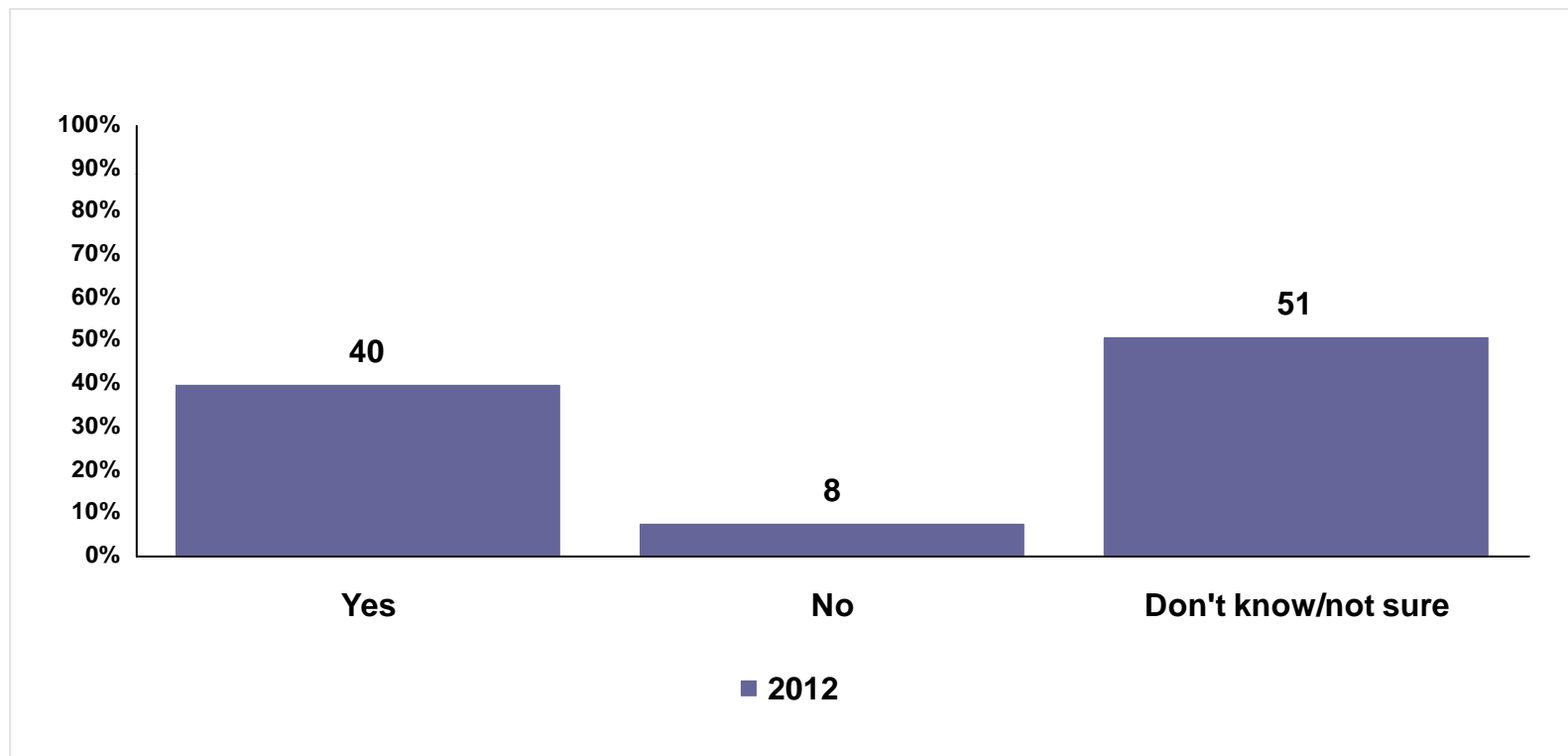
But preferred hours of opening are very age dependent.

	Age group	
	<55 years	55+ years
Weekdays between 9:00 and 1:00	15%	32%
Weekdays between 1:00 and 6:00	17%	31%
Weekdays between 6:00 and 8:30	36%	17%
Saturdays between 9:00 and 1:00	7%	1%
Saturdays between 1:00 and 5:00	13%	8%
Sundays between 1:30 and 5:00	12%	10%



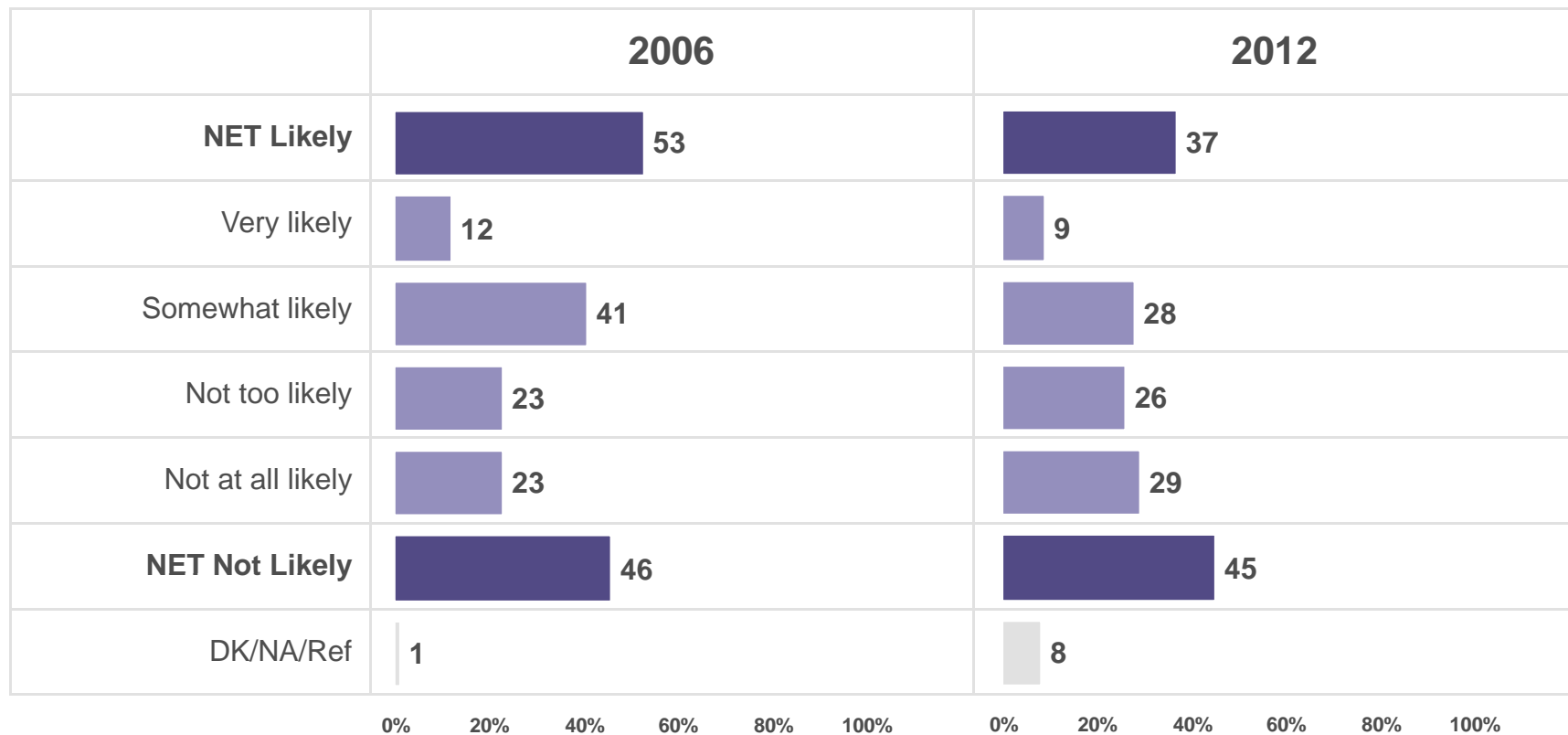
Detailed Analysis – Charitable Donations to TPL

A minority are aware of the TPL's charitable status. And frequent users are no more aware than infrequent and non users.



Q75. To the best of your knowledge, can members of the public or businesses make charitable donations of money to the Toronto Public Library?
 Base: Total sample (2012 n=1220)

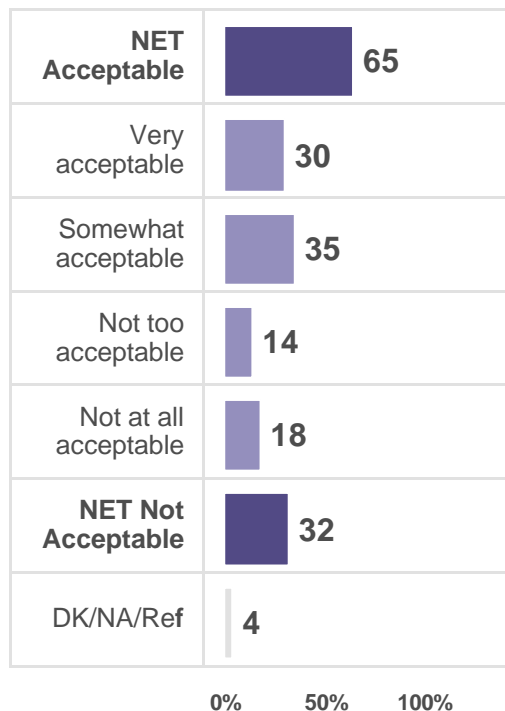
Likelihood of donating to the Toronto Public Library is limited, but dependent on frequency of usage. Among heavy users, 13% say they are very likely to donate.



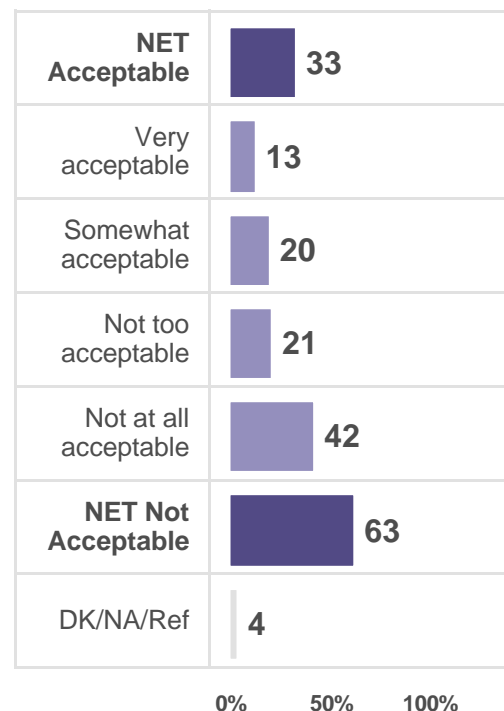
Q76. (Formerly Q.74) In reality, how likely would you be to donate money to the Toronto Public Library? Would you be very likely, somewhat likely, not too, likely or not at all likely?
 Base: All respondents (2006 n=1255; 2012 n=1220)

The sale of ebooks appears to be the most acceptable source of additional funding. Among those already downloading ebooks 60% say it is very acceptable.

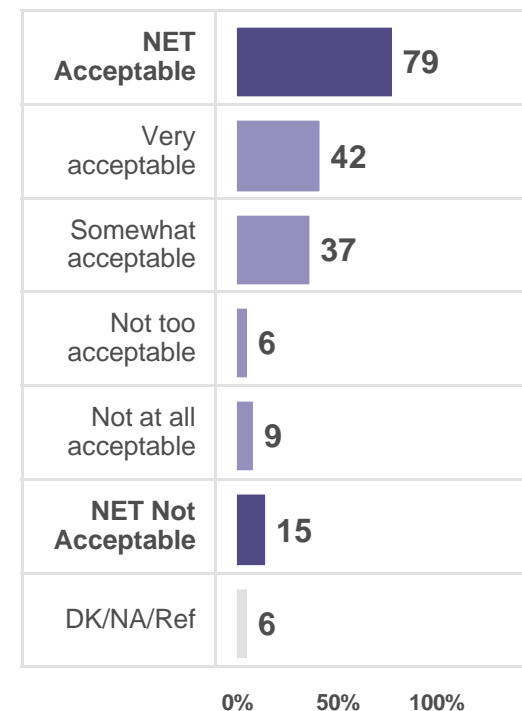
Have advertising in libraries, library publication, and the library website



Introduce paid parking at library parking lots



Sell ebooks or other items on the library website



Q77. The Toronto Public Library is considering different kinds of funding to enhance library services and programs. How acceptable are each of the following as ways of raising money to fund services?

Base: All respondents (2012 n=1220)



Summary

Summary

- ◆ Use of ebooks is a potentially large and growing market for the Library.
- ◆ There are few complaints about Library services, the only issues are a desire for more computers and ebooks to download.
- ◆ Satisfaction with Library staff and services are high and relatively stable over time.
- ◆ Library visitors typically undertake a wide variety of activities and this contributes to usage, but browsing and borrowing Library materials remain major activities.
- ◆ The Library is seen as providing high-quality, relevant and important services in Toronto communities.

Questions?